

[To be completed by transferee (buyer) prior to transfer of subject property in accordance with Section 480.3 of the Revenue and Taxation Code.] A Preliminary Change of Ownership Report must be filed with each conveyance in the County Recorder's office for the county where the property is located; this particular form may be used in all 58 counties of California.

THIS REPORT IS NOT A PUBLIC DOCUMENT

SELLER/TRANSFEROR: BUYER/TRANSFeree: ASSESSOR'S PARCEL NUMBER(S): PROPERTY ADDRESS OR LOCATION: MAIL TAX INFORMATION TO: Name Address	FOR RECORDER'S USE ONLY
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The property which you acquired may be subject to a supplemental assessment in an amount to be determined by the Orange County Assessor. For further information on your supplemental roll obligation, please call the Orange County Assessor at (714) 834-2941.

YES	NO	
<input type="checkbox"/>	<input type="checkbox"/>	A. Is this transfer solely between husband and wife (addition of a spouse, death of a spouse, divorce settlement, etc.)?
<input type="checkbox"/>	<input type="checkbox"/>	B. Is this transaction only a correction of the name(s) of the person(s) holding title to the property (for example, a name change upon marriage)?
<input type="checkbox"/>	<input type="checkbox"/>	C. Is this document recorded to create, terminate, or reconvey a lender's interest in the property?
<input type="checkbox"/>	<input type="checkbox"/>	D. Is this transaction recorded only as a requirement for financing purposes or to create, terminate, or reconvey a security interest (e.g., cosigner)?
<input type="checkbox"/>	<input type="checkbox"/>	E. Is this document recorded to substitute a trustee under a deed of trust, mortgage, or other similar document?
<input type="checkbox"/>	<input type="checkbox"/>	F. Did this transfer result in the creation of a joint tenancy in which the seller (transferor) remains as one of the joint tenants?
<input type="checkbox"/>	<input type="checkbox"/>	G. Does this transfer return property to the person who created the joint tenancy (original transferor)?
<input type="checkbox"/>	<input type="checkbox"/>	H. Is this transfer of property:
<input type="checkbox"/>	<input type="checkbox"/>	1. to a trust for the benefit of the <input type="checkbox"/> Grantor <input type="checkbox"/> Grantor's spouse?
<input type="checkbox"/>	<input type="checkbox"/>	2. to a trust revocable by the transferor?
<input type="checkbox"/>	<input type="checkbox"/>	3. to a trust from which the property reverts to the grantor within 12 years?
<input type="checkbox"/>	<input type="checkbox"/>	I. If this property is subject to a lease, is the remaining lease term 35 years or more including written options?
<input type="checkbox"/>	<input type="checkbox"/>	*J. Is this a transfer between <input type="checkbox"/> parent(s) and child(ren)? <input type="checkbox"/> or from grandparent(s) to grandchild(ren)?
<input type="checkbox"/>	<input type="checkbox"/>	*K. Is this transaction to replace a principal residence by a person 55 years of age or older? Within the same county? <input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/>	<input type="checkbox"/>	*L. Is this transaction to replace a principal residence by a person who is severely disabled as defined by Revenue and Taxation Code Section 69.5? Within the same county? <input type="checkbox"/> Yes <input type="checkbox"/> No

If the conveying document constitutes an exclusion from a change in ownership as defined in section 62 of the Revenue and Taxation Code for any reason other than those listed above, set forth the specific exclusions claimed: _____

Please answer all questions in each section. If a question does not apply, indicate with "N/A." Sign and date at bottom of second page.

A. Date of transfer if other than recording date _____

B. Type of transfer (*please check appropriate box*):

☐ Purchase ☐ Foreclosure ☐ Gift ☐ Trade or Exchange ☐ Merger, Stock, or Partnership Acquisition

☐ Contract of Sale — Date of Contract _____

☐ Inheritance — Date of Death _____ ☐ Other (*please explain*): _____

☐ Creation of a Lease ☐ Assignment of a Lease ☐ Termination of a Lease ☐ Sale/Leaseback

☐ Date lease began _____

☐ Original term in years (including written options) _____

☐ Remaining term in years (including written options) _____

Monthly Payment _____ Remaining Term _____

C. Was only a partial interest in the property transferred? ☐ Yes ☐ No

If **yes**, indicate the percentage transferred _____ %.

Please answer, to the best of your knowledge, all applicable questions, sign and date. If a question does not apply, indicate with "N/A."

PART III: PURCHASE PRICE AND TERMS OF SALE

- A. CASH DOWN PAYMENT OR Value of trade or exchange (excluding closing costs) Amount \$ _____
- B. FIRST DEED OF TRUST @ _____ % interest for _____ years. Pymts./Mo.=\$_____ (Prin. & Int. only) Amount \$ _____
- ☐ FHA (_____ Discount Points) ☐ Fixed rate ☐ New loan
- ☐ Conventional ☐ Variable rate ☐ Assumed existing loan balance
- ☐ VA (_____ Discount Points) ☐ All inclusive D.T. (\$_____ Wrapped) ☐ Bank or savings & loan
- ☐ Cal-Vet ☐ Loan carried by seller ☐ Finance company
- Balloon payment ☐ Yes ☐ No Due Date _____ Amount \$ _____
- C. SECOND DEED OF TRUST @ _____ % interest for _____ years. Pymts./Mo.=\$_____ (Prin. & Int. only) Amount \$ _____
- ☐ Bank or savings & loan ☐ Fixed rate ☐ New loan
- ☐ Loan carried by seller ☐ Variable rate ☐ Assumed existing loan balance
- Balloon payment ☐ Yes ☐ No Due Date _____ Amount \$ _____
- D. OTHER FINANCING: Is other financing involved not covered in (b) or (c) above? ☐ Yes ☐ No Amount \$ _____
- Type _____ @ _____ % interest for _____ years. Pymts./Mo.=\$_____ (Prin. & Int. only)
- ☐ Bank or savings & loan ☐ Fixed rate ☐ New loan
- ☐ Loan carried by seller ☐ Variable rate ☐ Assumed existing loan balance
- Balloon payment ☐ Yes ☐ No Due Date _____ Amount \$ _____
- E. WAS AN IMPROVEMENT BOND ASSUMED BY THE BUYER? ☐ Yes ☐ No Outstanding Balance: Amount \$ _____
- F. TOTAL PURCHASE PRICE (or acquisition price, if traded or exchanged, include real estate commission if paid) TOTAL ITEMS A THROUGH E \$ _____
- G. PROPERTY PURCHASED ☐ Through a broker ☐ Direct from seller ☐ From a family member ☐ Other (please explain): _____
- If purchased through a broker, provide broker's name and phone number: _____
- Please explain any special terms, seller concessions, or financing and any other information that would help the Assessor understand the purchase price and terms of sale: _____

PART IV: PROPERTY INFORMATION

- A. TYPE OF PROPERTY TRANSFERRED:
- ☐ Single-family residence ☐ Agricultural ☐ Timeshare
- ☐ Multiple-family residence (no. of units: _____) ☐ Co-op/Own-your-own ☐ Manufactured Home
- ☐ Commercial/Industrial ☐ Condominium ☐ Unimproved lot
- ☐ Other (Description: i.e., timber, mineral, water rights, etc. _____)
- B. IS THIS PROPERTY INTENDED AS YOUR PRINCIPAL RESIDENCE? ☐ Yes ☐ No
- If **yes**, enter the date of occupancy _____ / _____ / 20____ or intended occupancy _____ / _____ / 20____.
- (month) (day) (year) (month) (day) (year)
- C. IS PERSONAL PROPERTY INCLUDED IN PURCHASE PRICE (i.e., furniture, farm equipment, machinery, etc.) (other than a manufactured home subject to local property tax)? ☐ Yes ☐ No
- If **yes**, enter the value of the personal property included in the purchase price \$_____ (Attach itemized list of personal property.)
- D. IS A MANUFACTURED HOME INCLUDED IN PURCHASE PRICE? ☐ Yes ☐ No
- If **yes**, how much of the purchase price is allocated to the manufactured home? \$_____
- Is the manufactured home subject to local property tax? ☐ Yes ☐ No What is the decal number? _____
- E. DOES THE PROPERTY PRODUCE INCOME? ☐ Yes ☐ No If **yes**, is the income from:
- ☐ Lease/Rent ☐ Contract ☐ Mineral rights ☐ Other (please explain): _____
- F. WHAT WAS THE CONDITION OF THE PROPERTY AT THE TIME OF SALE?
- ☐ Good ☐ Average ☐ Fair ☐ Poor
- Please explain the physical condition of the property and provide any other information (such as restrictions, etc.) that would assist the Assessor in determining the value of the property: _____

CERTIFICATION**OWNERSHIP TYPE** ☒

- Proprietorship ☐
- Partnership ☐
- Corporation ☐
- Other _____ ☐

I certify that the foregoing is true, correct and complete to the best of my knowledge and belief.

This declaration is binding on each and every co-owner and/or partner.

NAME OF NEW OWNER/CORPORATE OFFICER

TITLE

SIGNATURE OF NEW OWNER/CORPORATE OFFICER

DATE



NAME OF ENTITY (typed or printed)

FEDERAL EMPLOYER ID NUMBER

ADDRESS (typed or printed)

TELEPHONE NUMBER

DATE

(NOTE: The Assessor may contact you for additional information.)

If a document evidencing a change of ownership is presented to the recorder for recordation without the concurrent filing of a preliminary change of ownership report, the recorder may charge an additional recording fee of twenty dollars (\$20).